A4957-2

QUARTERLY REPORT

1611 NORTH KENT STREET SUITE 900 ARLINGTON, VIRGINIA 22209 (703) 522-7277

FIRST QUARTER 1984

PRODUCTION

1984 (3 MOS.) HIGHLIGHTS

	UNITS	TOTAL 1984 1Q	% CHANGE FROM 1983 LEVEL
TOTAL PRODUCTION (N/R)	Mil. Pairs	84.7	- 7.0
TOTAL SHIPMENTS (N/R)			
• Quantity	Mil. Pairs	82.6	- 6.7
• Unit Value	Dollars	12.78	1.5
PRODUCTION BY SELECTED TYPES (N/R)			
• Men's	Mil. Pairs	19.8	- 4.3
• Women's	Mil. Pairs	30.5	- 9.2
• Juvenile	Mil. Pairs	14.2	5.2
• Athletic	Mil. Pairs	3.7	-33.9
• Slippers	Mil. Pairs	15.2	- 5.6
PRODUCTION BY MATERIAL (N/R)			
• Leather	Mil. Pairs	44.1	-10.4
• Other	Mil. Pairs	40.6	- 3.1
RUBBER/FABRIC PRODUCTION	Mil. Pairs	20.1	- 9.0

TABLE 1: U.S. PRODUCTION SUMMARY

	(Million Pairs)			1984/83
	1Q 1984	4Q 1983	1Q 1983	PERCENT CHANGE 1Q
NONRUBBER TOTAL	84.7	81.7	91.1	-7.0
RUBBER/FABRIC TOTAL	20.1	16.8	22.1	-9.0
NONRUBBER AND RUBBER/FABRIC TOTAL	104.8	98.5	113.2	-7.4

Source: U.S. Department of Commerce, Bureau of the Census.

FIA

FOOTWEAR INDUSTRIES OF AMERICA

TABLE 2: NONRUBBER FOOTWEAR BY KIND

KIND	(Million Pairs) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
MEN'S	19.8	18.3	20.7	- 4.3
YOUTH'S & BOYS'	2.0	1.9	1.9	5.3
WOMEN'S	30.5	30.6	33.6	- 9.2
MISSES'	1.9	1.2	2.3	-17.4
CHILDREN'S	3.2	3.1	3.8	-15.8
INFANTS'	7.1	5.9	5.5	29.1
ATHLETIC	3.7	3.4	5.6	-33.9
SLIPPERS	15.2	15.8	16.1	- 5.6
OTHER	1.3	1.5	1.6	-18.8
TOTAL SHOES & SLIPPERS	84.7	81.7	91.1	- 7.0

Source: U.S. Department of Commerce, Bureau of the Census.

TABLE 3: NONRUBBER FOOTWEAR BY MATERIAL

KIND	(Million Pairs) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q
LEATHER	44.1	43.4	49.2	-10.4
OTHER	40.6	38.3	41.9	- 3.1

Source: U.S. Department of Commerce, Bureau of the Census.

TABLE 4: NONRUBBER FOOTWEAR, DOMESTIC SHIPMENTS

	(Mil. Prs., Mil. Dollars) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
QUANTITY	82.6	78.0	88.5	-6.7
VALUE $	1055.6	1116.7	1115.0	-5.3
AVERAGE VALUE (Dollar per pair) $	12.78	14.32	12.59	1.5

Source: U.S. Department of Commerce, Bureau of the Census.

U. S. IMPORTS

1984 (3 MOS.) HIGHLIGHTS

TOTAL IMPORTS (N/R)	UNITS	TOTAL 1984 1Q	% CHANGE FROM 1983 LEVEL
• Quantity	Mil. Pairs	193.2	20.4
• Value (fob)	Mil. Dollars	1149.2	24.0
• Unit Value	Dollars	5.95	2.9
BY SELECTED TYPES (N/R)			
• Men's	Mil. Pairs	32.6	4.5
• Women's	Mil. Pairs	106.0	24.1
• Juvenile	Mil. Pairs	22.9	20.9
• Athletic	Mil. Pairs	28.6	21.7
BY MATERIAL (N/R)			
• Leather Footwear	Mil. Pairs	90.4	29.9
• Vinyl/Plastic	Mil. Pairs	67.3	23.0
• Other	Mil. Pairs	35.5	- 1.7
BY SELECTED COUNTRIES (N/R)			
• Taiwan	Mil. Pairs	81.2	20.7
• Korea	Mil. Pairs	32.2	13.8
• Brazil	Mil. Pairs	26.8	70.7
• Hong Kong	Mil. Pairs	6.9	38.0
• China	Mil. Pairs	2.9	52.6
• Italy	Mil. Pairs	21.2	- 5.8
• Spain	Mil. Pairs	9.5	50.8
UNLASTED LEATHER SHOE UPPERS	Mil. Pairs	6.2	110.9
ALL OTHER SHOE UPPERS	Mil. Pairs	7.0	28.5
RUBBER/FABRIC FOOTWEAR	Mil. Pairs	37.2	7.5
• Taiwan	Mil. Pairs	16.1	4.5
• Korea	Mil. Pairs	10.4	- 1.9
• China	Mil. Pairs	4.5	32.4

TABLE 5: U.S. IMPORTS SUMMARY

	(Million Pairs)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
NONRUBBER TOTAL	193.2	141.8	160.4	20.4
RUBBER/FABRIC TOTAL	37.2	26.8	34.6	7.5
NONRUBBER AND RUBBER/FABRIC TOTAL	230.4	168.6	195.0	18.2

Source: U.S. Department of Commerce

TABLE 6: NONRUBBER FOOTWEAR IMPORTS BY KIND

6A. Quantity

KIND	(Million Pairs) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
MEN'S	32.6	30.3	31.2	4.5
YOUTH'S & BOYS'	2.2	2.4	1.9	15.8
WOMEN'S	106.0	70.1	85.4	24.1
MISSES'	5.6	3.0	5.0	12.0
CHILDREN'S	9.3	7.0	7.2	29.2
INFANTS'	5.8	4.6	4.9	18.4
ATHLETIC	28.6	21.7	23.5	21.7
SLIPPERS & ALL OTHER	3.1	2.7	1.3	138.5
TOTAL - ALL	193.2	141.8	160.4	20.4

6B. Unit Value

KIND	(Dollars per Pair) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
MEN'S	7.37	7.40	7.05	4.5
YOUTH'S & BOYS'	4.80	5.13	4.32	11.1
WOMEN'S	5.99	6.45	5.72	4.7
MISSES'	3.11	3.87	3.21	-3.1
CHILDREN'S	2.89	3.46	2.76	4.7
INFANTS'	1.92	1.89	1.84	4.3
ATHLETIC	6.92	7.66	6.80	1.8
SLIPPERS & ALL OTHER	3.11	3.62	3.86	-19.4
TOTAL - ALL	5.95	6.41	5.78	2.9

Source: U.S. Department of Commerce

TABLE 7: NONRUBBER FOOTWEAR IMPORTS BY MATERIAL

7A. Quantity

MATERIAL	(Million Pairs) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
Leather	90.4	64.6	69.6	29.9
Vinyl/Plastic	67.3	45.1	54.7	23.0
Other	35.5	32.1	36.1	-1.7

7B. Unit Value

MATERIAL	(Dollars per Pair) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
Leather	8.61	9.14	8.52	1.1
Vinyl/Plastic	3.30	4.23	3.34	-1.2
Other	4.19	3.98	4.20	-0.2

Source: U.S. Department of Commerce

TABLE 8: NONRUBBER FOOTWEAR IMPORTS BY SELECTED COUNTRIES

8A. Quantity

	(Million Pairs)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
Taiwan	81.2	60.9	67.3	20.7
Korea	32.2	31.1	28.3	13.8
Italy	21.2	8.2	22.5	-5.8
Spain	9.5	6.6	6.3	50.8
Brazil	26.8	18.8	15.7	70.7
France	1.3	0.7	1.2	8.3
Mexico	1.4	0.7	1.3	7.7
India	0.4	0.1	0.6	-33.3
Poland	0.1	0.1	0.3	-66.7
Romania	0.3	0.5	0.6	-50.0
Yugoslavia	0.4	0.6	0.4	NC
Japan	0.9	0.9	0.9	NC
Hong Kong	6.9	5.0	5.0	38.0
Philippines	2.1	1.2	3.2	-34.4
Austria	0.1	0.1	*	-
Thailand	1.9	0.7	1.7	11.8
Greece	0.3	0.1	0.4	-25.0
China	2.9	1.8	1.9	52.6
TOTAL - WORLD	193.2	141.8	160.4	20.4

* - Less than 50,000 pairs
NC - No Change

8B. Unit Value

	(Dollars per Pair)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
Taiwan	4.20	4.98	3.96	6.1
Korea	6.11	5.65	5.92	3.2
Italy	9.88	13.40	8.99	9.9
Spain	9.61	9.30	9.38	2.5
Brazil	7.23	7.94	7.50	- 3.6
France	15.73	17.48	17.40	- 9.6
Mexico	6.47	11.25	5.61	15.3
India	5.91	10.18	4.21	40.4
Poland	6.64	6.82	5.48	21.2
Romania	8.03	9.12	7.25	10.8
Yugoslavia	10.27	9.57	9.63	6.6
Japan	5.04	3.89	6.63	-24.0
Hong Kong	2.70	3.04	2.56	5.5
Philippines	3.82	5.65	3.15	21.3
Austria	8.63	19.05	32.55	-73.5
Thailand	2.77	3.96	2.32	19.4
Greece	8.67	10.73	9.03	- 4.0
China	1.68	2.52	3.00	-44.0
TOTAL - WORLD	5.95	6.41	5.78	2.9

Source: U.S. Department of Commerce

TABLE 9: RUBBER/FABRIC IMPORTS BY COUNTRY

COUNTRY	(Million Pairs) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
Taiwan	16.1	8.4	15.4	4.5
Korea	10.4	10.1	10.6	- 1.9
China	4.5	3.3	3.4	32.4
Italy	0.2	0.1	0.5	-60.0
Hong Kong	1.0	1.1	0.9	11.1
Mexico	3.5	3.1	3.0	16.7
All Other	1.5	0.7	0.8	87.5
TOTAL - WORLD	37.2	26.8	34.6	7.5

Source: U.S. Department of Commerce

TABLE 10: UNLASTED LEATHER SHOE UPPERS BY COUNTRY

COUNTRY	(Thousand Pairs) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
India	761	632	435	74.9
Haiti	1802	866	315	-472.1
Brazil	835	395	271	208.1
Korea	1325	589	778	70.3
Taiwan	332	251	231	43.7
Dominican Republic	670	561	576	16.3
All Other	485	334	339	43.1
TOTAL - WORLD	6210	3628	2945	110.9

Source: U.S. Department of Commerce

TABLE 11: RUBBER/PLASTIC, COTTON & FIBER UPPERS BY COUNTRY

COUNTRY	(Thousand Pairs) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
Dominican Republic	1770	1733	1486	19.1
Hong Kong	210	284	147	42.9
Haiti	45	10	28	60.7
Korea	299	115	80	273.8
Taiwan	4187	1883	3529	18.6
All Other	459	533	155	196.1
TOTAL - WORLD	6970	4558	5425	28.5

Source: U.S. Department of Commerce

U. S. EXPORTS

1984 (3 MOS.) HIGHLIGHTS

TOTAL EXPORTS (N/R)	UNITS	TOTAL 1984 1Q	% CHANGE FROM 1983 LEVEL
• Quantity	Mil. Pairs	1.6	- 5.9
• Value (fob)	Mil. Dollars	20.7	- 9.2
• Unit Value	Dollars	13.21	1.0
EXPORTS BY TYPES (N/R)			
• Men's	Thous. Pairs	404	-10.8
• Women's	Thous. Pairs	330	-37.7
• Juvenile	Thous. Pairs	84	-56.7
• Athletic Total	Thous. Pairs	679	54.0
Sports	Thous. Pairs	487	68.5
Running	Thous. Pairs	192	26.3
• Slippers	Thous. Pairs	73	-38.1
EXPORTS BY COUNTRY (N/R)			
• Canada	Thous. Pairs	165	-5.7
• Mexico	Thous. Pairs	137	29.2
• Japan	Thous. Pairs	412	202.9
• Venezuela	Thous. Pairs	6	-71.4
• France	Thous. Pairs	85	16.4
• West Germany	Thous. Pairs	57	32.6

TABLE 12: U.S. EXPORTS BY KIND

12A. Quantity

KIND	(Thousand Pairs) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
MEN'S	404	411	453	-10.8
YOUTH'S & BOYS'	13	22	23	-43.5
WOMEN'S	330	581	530	-37.7
Sandals	85	276	276	-69.2
Boots	52	49	64	-18.8
Other	193	256	190	1.6
MISSES', CHILDREN'S & INFANTS'	71	126	171	-58.5
ATHLETIC TOTAL	679	526	441	54.0
Designed for Sports	487	439	289	68.5
Joggers & Running	192	87	152	26.3
SLIPPERS	73	109	118	-38.1

12B. Unit Value

KIND	(Dollars per Pair) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
MEN'S	15.55	16.12	18.04	-13.8
YOUTH'S & BOYS'	5.19	7.07	3.83	35.5
WOMEN'S TOTAL	13.72	12.51	10.85	26.5
Sandals	10.60	11.69	10.35	2.4
Boots	13.35	11.10	10.55	26.5
Other	15.20	13.65	11.67	30.2
MISSES', CHILDREN'S & INFANTS'	5.63	5.33	6.92	-18.6
ATHLETIC TOTAL	13.31	12.43	15.34	-13.2
Designed for Sports	11.63	12.09	17.43	-33.3
Joggers & Running	17.59	14.19	11.37	54.7
SLIPPPERS	5.80	5.07	7.12	-18.5

Source: U.S. Department of Commerce

TABLE 13: U.S. EXPORTS BY COUNTRY

13A. Quantity

	(Thousand Pairs)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
Canada	165	217	175	- 5.7
Bahamas	31	79	97	- 68.0
Venezuela	6	13	21	- 71.4
Japan	412	338	136	202.9
Mexico	137	110	106	29.2
N. Antilles	40	70	38	5.3
Norway	13	2	20	- 35.0
W. Germany	57	33	43	32.6
Bermuda	21	15	35	- 40.0
United Kingdom	63	34	37	70.3
Sweden	28	20	17	64.7
Honduras	10	31	12	- 16.7
France	85	47	73	16.4
Colombia	12	62	78	- 84.6
Trinidad	42	46	97	- 56.7
Netherlands	25	11	25	NC
Italy	71	157	146	- 51.4
Panama	9	13	19	- 52.6
Switzerland	16	9	22	- 27.3
Liberia	7	21	3	133.3

13B. Unit Value

	(Dollars per Pair)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
Canada	12.18	9.67	16.02	- 24.0
Bahamas	10.19	9.16	7.59	34.3
Venezuela	7.56	10.06	8.86	- 14.7
Japan	12.18	12.46	17.00	- 28.4
Mexico	3.31	4.00	3.70	- 10.5
N. Antilles	8.42	10.52	8.84	- 4.8
Norway	21.86	14.64	21.96	- 0.5
W. Germany	21.64	17.06	17.42	24.2
Bermuda	14.67	10.88	12.51	17.3
United Kingdom	12.81	18.95	17.35	- 26.2
Sweden	21.65	11.34	21.88	- 1.1
Honduras	13.27	9.62	6.69	98.4
France	24.09	19.26	21.66	11.2
Colombia	13.60	16.56	12.22	11.3
Trinidad	9.07	8.58	7.87	15.2
Netherlands	21.29	22.28	15.24	39.7
Italy	17.18	20.14	19.30	- 11.0
Panama	10.36	11.72	3.11	233.1
Switzerland	24.79	15.62	10.77	130.2
Liberia	31.72	5.53	10.60	199.2

NC - No change
Source: U.S. Department of Commerce

TABLE 14: U.S. EXPORTS BY TYPES OF UPPERS

LEATHER UPPERS

14A. Quantity

KIND	(Thousand Pairs) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
MEN'S	159	168	234	-32.1
YOUTH'S & BOYS'	8	9	7	14.3
WOMEN'S TOTAL	168	250	268	-37.3
Sandals	38	115	113	-66.4
Boots	34	34	50	-32.0
Other	96	101	105	- 8.6
MISSES', CHILDREN'S & INFANTS'	26	18	36	-27.8
ATHLETIC TOTAL	75	66	136	-44.9
Designed for Sports	72	51	117	-38.5
Joggers & Running	3	15	19	-84.2
SLIPPERS	19	58	32	-40.6
TOTAL	455	569	713	-36.2

14B. Unit Value

KIND	(Dollars Per Pair) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
MEN'S	28.72	28.45	27.01	6.3
YOUTH'S & BOYS'	6.45	10.60	5.43	18.8
WOMEN'S TOTAL	14.76	13.06	11.27	31.0
Sandals	11.70	12.63	11.75	- 0.4
Boots	15.74	12.55	10.78	46.0
Other	15.66	13.73	10.98	42.6
MISSES', CHILDREN'S & INFANTS'	5.54	8.69	13.64	-59.4
ATHLETIC TOTAL	15.30	14.85	20.29	-24.6
Designed for Sports	15.43	14.84	20.63	-25.2
Joggers & Running	12.27	14.90	18.21	-32.6
SLIPPPERS	6.19	2.29	6.67	- 7.2
TOTAL	18.69	16.54	18.01	3.8

TABLE 14: U.S. EXPORTS BY TYPES OF UPPERS

NONLEATHER UPPERS

14C. Quantity

KIND	(Thousand Pairs) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
MEN'S	245	243	219	11.9
YOUTH'S & BOYS'	5	13	16	- 68.8
WOMEN'S TOTAL	162	331	262	- 38.2
Sandals	46	161	163	- 71.8
Boots	18	15	14	28.6
Other	98	155	85	15.3
MISSES', CHILDREN'S & INFANTS'	45	108	141	- 68.1
ATHLETIC TOTAL	604	460	305	98.0
Designed for Sports	415	388	172	141.3
Joggers & Running	189	72	133	42.1
SLIPPERS	54	51	86	- 37.2
TOTAL	1115	1206	1029	8.4

14D. Unit Value

KIND	(Dollars per Pair) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
MEN'S	7.03	7.60	8.45	-16.8
YOUTH'S & BOYS'	3.27	4.64	3.13	4.5
WOMEN'S TOTAL	12.64	12.08	10.41	21.4
Sandals	11.70	11.02	9.37	24.9
Boots	15.74	7.80	9.71	62.1
Other	15.66	13.60	12.52	25.1
MISSES', CHILDREN'S & INFANTS'	5.67	4.76	4.91	15.5
ATHLETIC TOTAL	13.00	12.08	13.13	- 1.0
Designed for Sports	10.97	11.72	15.24	-28.0
Joggers & Running	17.68	14.04	10.39	70.2
SLIPPPERS	5.66	8.19	7.29	-22.4
TOTAL	10.98	10.28	9.67	13.5

Souce: U.S. Department of Commerce

MARKET SUPPLY

1984 (3 MOS.) HIGHLIGHTS

	UNITS	TOTAL 1984 1Q	% CHANGE FROM 1983 LEVEL
TOTAL MARKET (N/R & R/F)			
• Nonrubber (N/R)	Mil. Pairs	276.3	10.6
• Rubber/Fabric (R/F)	Mil. Pairs	57.3	1.1
IMPORT SHARE OF MARKET (N/R & R/F)			
• Nonrubber	Percent	69.9	8.9
• Rubber/Fabric	Percent	64.9	6.4
MARKET BY SELECTED TYPES (N/R)			
• Men's Market	Mil. Pairs	52.4	1.0
Import Share	Percent	62.2	3.3
• Women's Market	Mil. Pairs	136.5	14.6
Import Share	Percent	77.7	8.5
• Juvenile Market	Mil. Pairs	37.1	14.2
Import Share	Percent	61.7	5.5
• Athletic Market	Mil. Pairs	32.3	11.0
Import Share	Percent	88.6	9.7
MARKET BY MATERIAL (N/R)			
• Leather Footwear	Mil. Pairs	134.5	13.2
Import Share	Percent	67.2	14.7
• Other Footwear	Mil. Pairs	143.4	8.1
Import Share	Percent	71.7	4.8

TABLE 15: TOTAL MARKET SUPPLY

TABLE 15A. NONRUBBER FOOTWEAR

	(Million Pairs)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
Domestic	84.7	81.7	91.1	- 7.0
Imports	193.2	141.8	160.4	20.4
Exports	1.6	1.8	1.7	- 5.9
Market Supply	276.3	221.7	249.8	10.6
Import Penetration (%)	69.9	64.0	64.2	8.9

TABLE 15B. RUBBER/FABRIC FOOTWEAR

	(Million Pairs)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
Domestic	20.1	16.8	22.1	-9.0
Imports	37.2	26.8	34.6	7.5
Market Supply	57.3	43.6	56.7	1.1
Import Penetration* (%)	64.9	61.5	61.0	6.4

TABLE 15C. NONRUBBER AND RUBBER/FABRIC

	(Million Pairs)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
Domestic	104.8	98.5	113.2	-7.4
Imports	230.4	168.6	195.0	18.2
Exports **	1.6	1.8	1.7	-5.9
Market Supply	333.6	265.3	306.5	8.8
Import Penetration (%)	69.1	63.6	63.6	8.6

*Import share of market including small quantities of exports
**Nonrubber only

Source: U.S. Department of Commerce

NONRUBBER FOOTWEAR

TABLE 16: MARKET BY KIND

KIND	(Million Pairs)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
MEN'S	52.4	48.6	51.9	1.0
YOUTH'S & BOYS'	4.2	4.3	3.8	10.5
WOMEN'S	136.5	100.7	119.1	14.6
MISSES'	7.5	4.2	7.3	2.7
CHILDREN'S	12.5	10.1	11.0	13.6
INFANTS'	12.9	10.5	10.4	24.0
ATHLETIC	32.3	25.1	29.1	11.0
SLIPPERS & OTHER	19.6	41.6	19.0	3.2

Note: Market = U.S. Production plus U.S Imports including small quantities of exports in each kind.

Source: U.S. Department of Commerce

TABLE 17: IMPORT PENETRATION OF MARKET BY KIND

	(Percent)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
MEN'S	62.2	62.3	60.2	3.3
YOUTH'S & BOYS'	52.4	55.8	50.0	4.8
WOMEN'S	77.7	69.6	71.6	8.5
MISSES'	74.7	71.4	68.5	9.1
CHILDREN'S	74.4	69.3	65.5	13.6
INFANTS'	45.0	43.8	47.1	- 4.5
ATHLETIC	88.6	86.5	80.8	9.7
SLIPPERS & OTHER*	15.8	58.7	6.9	129.0

*Owing to narrow and imperfect definition of slippers in U.S. Tariff Schedule, import penetration is estimated to be understated by about seventy-five percent.

Source: U.S. Department of Commerce

TABLE 18: MARKET SUPPLY AND IMPORT PENETRATION BY MATERIAL

	(Million Pairs)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
Leather				
Domestic	44.1	43.4	49.2	-10.4
Imports	90.4	64.6	69.6	29.9
Total Supply	134.5	108.0	118.8	13.2
Import Penetration (%)	67.2	59.8	58.6	14.7
Other				
Domestic	40.6	28.2	41.9	- 3.1
Imports	102.8	77.2	90.8	13.2
Total Supply	143.4	105.4	132.7	8.1
Import Penetration (%)	71.7	73.2	68.4	4.8

Source: U.S. Department of Commerce

LABOR

1984 (3 MOS.) HIGHLIGHTS

EMPLOYMENT & EARNINGS	UNITS	TOTAL 1984 1Q	% CHANGE FROM 1983 LEVEL
• All Employees	Thousands	125.0	-2.0
• Production Employees	Thousands	106.4	-1.7
- Average hourly earnings	Dollar	5.42	3.2
- Average weekly hours	Hours	35.7	3.5
PRODUCTIVITY			
• Production/production employee hour	# Pairs	1.78	-8.7

TABLE 19: EMPLOYMENT AND EARNINGS

	1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
All Employees (000)	125.0	127.5	127.6	-2.0
Prod. Workers (000)	106.4	109.0	108.2	-1.7
Ave. Weekly Earnings $	193.68	194.47	181.25	6.9
Ave. Hourly Earnings $	5.42	5.31	5.25	3.2
Average Weekly Hours	35.7	36.6	34.5	3.5

Source: U.S. Department of Labor, Bureau of Labor Statistics (BLS)

TABLE 20: PRODUCTIVITY
(PRODUCTION PER PRODUCTION EMPLOYEE HOUR)

	1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
Production (Mil. Prs.)	84.7	81.7	91.1	-7.0
Production Employees total hours (Mil.)	47.5	49.9	46.7	1.7
Production per employee hour (pairs per hour)	1.78	1.64	1.95	-8.7

Source: FIA

PRICES

1984 (3 MOS.) HIGHLIGHTS

PRODUCER PRICE INDEX	UNITS	TOTAL 1984 1Q	% CHANGE FROM 1983 LEVEL
• All Commodities	1967 = 100	309.2	2.9
• Cattlehides	1967 = 100	493.1	48.5
• Cattlehide Leather	1967 = 100	358.2	13.6
• Nonrubber Footwear	1967 = 100	252.2	1.2
CONSUMER PRICE INDEX			
• All Items	1967 = 100	306.4	4.5
• Footwear (all)	1967 = 100	206.9	0.6

TABLE 21: PRODUCER PRICE INDEX

	(1967 = 100)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	10%
All Commodities	309.2	305.9	300.5	2.9
Cattlehides	493.1	435.0	332.0	48.5
All Leathers	360.1	340.4	314.5	14.5
Cattlehide Leather	358.2	342.8	315.4	13.6
Nonrubber Footwear	252.2	251.0	249.1	1.2
Men's & Boys' Footwear	289.7	287.1	285.2	1.6
Women's & Misses' Footwear	228.4	228.1	227.1	0.6
Children's and Infants' Footwear	211.3	209.3	208.2	1.5

Source: U.S. Department of Labor, BLS

TABLE 22: CONSUMER PRICE INDEX

	(1967 = 100)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	10%
All Items	306.4	303.1	293.2	4.5
Apparel & Upkeep	197.1	200.2	192.5	2.4
Footwear (all)	206.9	208.5	205.7	0.6

Source: U.S. Department of Labor, BLS

RETAIL SALES

1984 (3 MOS.) HIGHLIGHTS

	UNITS	TOTAL 1984 1Q	% CHANGE FROM 1983 LEVEL
Department Chains	Mil. Dollars	22913	12.4
Shoe Chains	Mil. Dollars	1054	8.2
Apparel Chains	Mil. Dollars	4735	14.6
Shoe Stores - Independent	Mil. Dollars	1021	3.7
Apparel Stores - Independent	Mil. Dollars	7073	7.8

(The above outlets represent about 90% of total shoe sales.)

TABLE 23: RETAIL SALES

	(Million Dollars)			1984/83 PERCENT CHANGE
	1Q 1984	4Q 1983	1Q 1983	1Q%
TOTAL - ALL	37815	61301	33969	11.3
Department Stores	23932	40854	21319	12.3
Apparel Stores	11808	17696	10691	10.4
Shoe Stores	2075	2751	1959	5.9
Chain Stores-Total	28702	48189	25493	12.6
Department Stores	22913	39076	20388	12.4
Apparel Stores	4735	7651	4131	14.6
Shoe Stores	1054	1462	974	8.2
Independent Stores-Total	9113	13112	8476	7.5
Department Stores	1019	1778	931	9.5
Apparel Stores	7073	10045	6560	7.8
Shoe Stores	1021	1289	985	3.7

Source: U.S. Department of Commerce, Bureau of the Census

PERSONAL CONSUMPTION EXPENDITURE (PCE)

1984 (3 MOS.) HIGHLIGHTS

	UNITS	TOTAL 1984 1Q	% CHANGE FROM 1983 LEVEL
PCE ON SHOES	Billion Dollars Annualized Rate	21.8	11.8
As a percent of PCE on:			
• All goods & services	Percent	0.96	2.1
• Nondurable goods	Percent	2.59	2.8
• Clothing & shoes	Percent	16.02	-0.1

TABLE 24: PERSONNEL CONSUMPTION EXPENDITURES

	(Billion Dollars) 1Q 1984	4Q 1983	1Q 1983	1984/83 PERCENT CHANGE 1Q%
Total PCE - All Goods and Services	2276.5	2230.2	2070.4	10.0
Durable Goods	310.9	299.8	259.4	19.9
Services	1124.4	1107.5	1035.8	8.6
Nondurable Goods	841.3	823.0	775.2	8.5
Clothing & Shoes	136.1	132.5	121.6	11.9
Shoes	21.8	21.3	19.5	11.8
PCE on shoes as a percentage of total PCE on:				
All Goods	0.96	0.96	0.94	2.1
Durable Goods	7.01	7.10	7.52	-6.8
Nondurable Goods	2.59	2.59	2.52	2.8
Clothing & Shoes	16.02	16.08	16.04	-0.1

Source: U.S. Department of Commerce